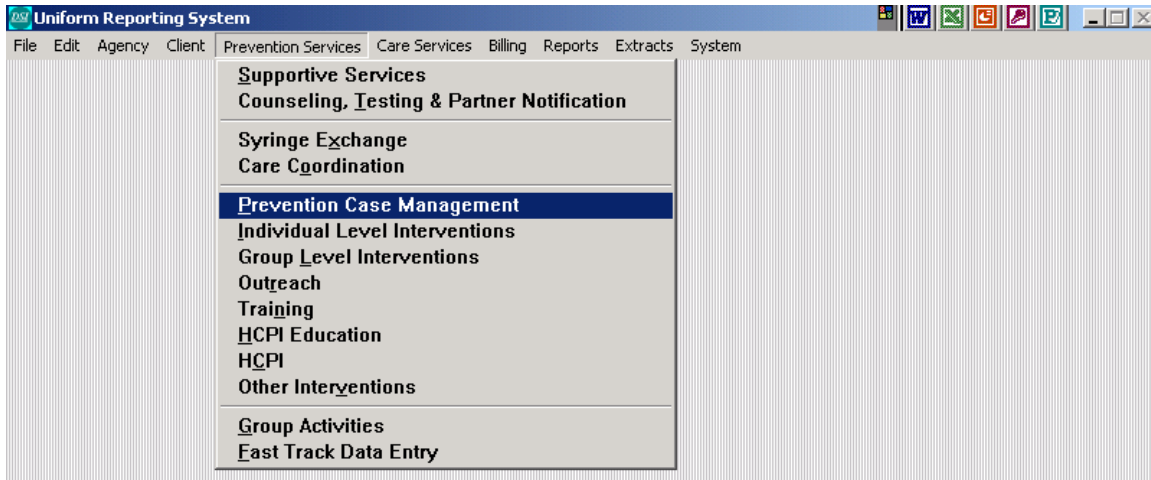


How to enter a Plan Development Encounter

Each client must be already entered into URS before any Prevention Case Management encounters can be entered.



1. Press **Prevention Services** menu
2. Select **Prevention Case Management**

The screenshot shows the 'Prevention Case Management Encounter Form' in the URS system. The 'Add' button is circled. The 'Client' field is highlighted, showing 'SAM YOSEMITE' and 'ID SAYO010160M1'. The 'Status' is 'Active'. The form includes fields for Encounter Type, Actual Date, Scheduled Date, Actual Location, Sched. Location, Encounter With, Involved Agency, Involved Agency 2, Program, Staff, Team, Site, Collaterals Involved, Problems Identified, and Service(s) Provided. There are also buttons for Select, Remove, Add, Delete, View Referrals Made..., View Progress Note..., and View HIV/AIDS Risks.

3. Press **Client** button
4. In the **Select a Client** screen, press **List** button
5. Select a client from the client list and press **OK**
6. Back in the **Prevention Case Management Encounter Form**, press **Add** button to add encounter
7. Press **Encounter Type** button

Uniform Reporting System

File Edit Agency Client Prevention Services Care Services Billing Reports Extracts System

Add Edit Delete Cancel Save Order Date List < > Print Close

Client COYOTE, WILEY E. ID COWI060360M1 Status Active

ADD Prevention Case Management Encounter Form

Encounter

Encounter Type

Actual Date

Scheduled Date

Encounter With

Involved Agency

Involved Agency 2

Program

Staff

Collaterals Involved

Nothing entered

Service(s) Provider

No services for

Encounter Type

01 Screening/Intake

02 Plan Development

03 Plan Implementation

04 Reassessment

05 Case Closure Activities

06 Drug Treatment Advocacy

OK Cancel

Order by: Code

1. Select **02 Plan Development** in the **Encounter Type** screen

Uniform Reporting System

File Edit Agency Client Prevention Services Care Services Billing Reports Extracts System

Add Edit Delete Cancel Save Order Date List < > Print Close

Client COYOTE, WILEY E. ID COWI060360M1 Status Active

ADD Prevention Case Management Encounter Form

Encounter

Encounter Type 02 Plan Development

Actual Date // Actual Location

Scheduled Date // Sched. Location

Encounter With

Involved Agency

Involved Agency 2

Program

Staff

Team

Site

TIME:

Start :

End :

Total 00:00

Collaterals Involved

Nothing entered

Select

Problems Identified

Nothing entered

Add

Service(s) Provided

No services for encounter

Add...

Edit

Delete

Referrals Made...

Progress Note...

HIV/AIDS Risks

2. Enter bold fields, including **Actual Date**, **Program**, **Staff**, **Site**
3. Enter any **Collaterals Involved** by pressing **Select** button. Collaterals have to be entered at client intake.
4. Enter any **Problems Identified** by pressing **Add** button
5. Under **Service(s) Provided** press **Add** button

Uniform Reporting System

File Edit Agency Client Prevention Services Care Services Billing Reports Extracts System

Add Edit Delete Cancel Save Order Date List < > >| Print Close

Client COYOTE, WILEY E. ID COWI060360M1 Status Active

ADD Prevention Case Management Encounter Form

Encounter

Encounter Type 02 Plan Development TIME:

Actual Date 11/01/2003 Scheduled Date //

Encounter With Involved Agency Involved Agency 2

Program Staff

Collaterals Involved Nothing entered

Service(s) Provided No services for encounter

Services Provided

Service

Activity Code Time Start Time End Time Spent 00:00

How Provided Location Outcome Staff Value 0.00 # Of Items 0

Remarks... OK Cancel

Delete HIV/AIDS Risks

1. In **Services Provided** screen, press **Activity Code** button to access activity codes defined below:

PCM/Plan Development ACTIVITY CODE DEFINITION

0021 Plan Development- Using information gathered from the client assessment, the PCM assist the client in developing a risk reduction and service plan. The plan should focus on behavioral change and addressing unmet needs.

Uniform Reporting System

File Edit Agency Client Prevention Services Care Services Billing Reports Extracts System

Add Edit Delete Cancel Save Order Date List < > >| Print Close

Client COYOTE, WILEY E. ID COWI060360M1 Status Active

ADD Prevention Case Management Encounter Form

Encounter

Encounter Type 02 Plan Development TIME:

Actual Date 11/01/2003 Actual Location Scheduled Date //

Encounter With Involved Agency Involved Agency 2

Program Staff

Collaterals Involved Nothing entered

Service(s) Provided No services for encounter

Services Provided

Service

Activity Code 0021 Plan Development Time Start Time End Time Spent 00:00

How Provided Location Outcome Staff Value 0.00 # Of Items 0

Remarks... OK Cancel

1. Enter **Time Start** and **Time End**
2. Press **Location** to select location where the Plan Development encounter took place

3. Enter **Outcome** to select an outcome
4. Enter **Staff** to select a staff member who performed the Plan Development
5. Press **OK** exit **Services Provided** screen
6. In main encounter form, press **Referrals Made** button

The screenshot shows the 'Uniform Reporting System' window with the 'Referral Information' form for client 'FUDD, ELMER T.' (ID: FUEL060460M1, Intake Date: 05/01/2003, Age: 43). The form is divided into two main sections: 'Service Need' and 'Referral Information'. The 'Service Need' section includes fields for 'Category', 'Service', and 'Priority'. The 'Referral Information' section includes fields for 'On Site [Y/N]' (set to N), 'Referred To', 'Date Need Identified' (set to //), 'Date Referral Made' (set to 01/11/2003), 'Date Service Verified' (set to //), 'Status', '# Appointments Per Week' (set to 0), and 'Appointments Being Kept [Y/N]' (set to N). A list box on the left shows 'No referrals found'. At the bottom, there are buttons for 'Add', 'Edit', 'Delete', 'Print Form', 'OK', and 'Cancel'.

1. Press **Add** button
2. Fill in bold fields on right side of screen including **Category**, **Service**, **On Site (Y/N)**, **Date Referral Made**
3. Under **Referral Information** press **Referred To** button to select organization where the client was referred
4. Press **Status** button to select a status of the referral
5. Press **OK**
6. Press **Close**
7. Press **Save** on main encounter form